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ORD-1673-76

2 August 1976

MEMORANDUM FOR: ORD Career Service Panel

SUBJECT: Study on Administrative Procedures

In accordance with ORD-0789/76, ORD MAG undertook a study of administrative procedures and related paperwork in order to identify areas for potential improvement. The objectives in this initial study are to determine those areas which seem to generate the heaviest administrative burden and those areas where modifications to current procedures are desirable. The heaviest administrative burden appears to result from the annual budgeting process. The Project Review Board was identified as an area where some modifications to current procedures would be desirable. The results of the ORD MAG Study of these two areas are described below.

Annual Budgeting Process:

In evaluating the sources of paperwork within ORD it is apparent that the greatest single source of this paperwork is the annual budgeting process. This process has grown over the past several years from a relatively controlled management function to an administrative exercise involving most ORD employees and all ORD customers. The increasing amount of paperwork necessary to support this exercise is evident from a brief review of the reorganized business planning approach as proposed by the MIACS system (Attachment 1). This chart depicts a planning process that requires and consumes a great percentage of ORD resources. That technical programs are to be initiated, conducted, and evaluated is almost neglected. Although it is clear that the actual resources of ORD are not distributed in this manner, such a document fosters an unhealthy view of the relative importance of planning and budgeting.

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During the conduct of this annual process, a large number of modifications and rewrites are inevitably made to budget submissions. Some rewrites are to be expected, especially in cases of substantive technical modifications. Beyond the technical stage, however, the use of ORD technical officers in rewriting and modifying administrative submissions, submission formats, and other nontechnical parameters places an unduly heavy burden on the operating divisions which are simultaneously conducting ongoing R&D programs. It seems reasonable under these circumstances to propose that staff support during the budget phases be increased and assigned to these functions. In this way, the operating divisions can be limited to contributions of a technical nature while the supporting staff can handle the administrative burden.

An additional aspect of the budgeting process where increased staff support would be extremely helpful is in the coordination exercise. Certainly, person-to-person interaction by technical officers is the essential part of this exercise, but the documentation and back-and-forth exchange of rankings and proposals could be handled more efficiently by a single staff function.

Therefore, with regard to the study of the annual budgeting process, the main recommendation of ORD MAG is to provide increased staff support. Support provided in the manner described in this memorandum would result in the objectives of the budgeting process being accomplished more effectively and efficiently and would provide a desirable degree of consistency and uniformity.

Project Review Board:

The second aspect of administrative procedures studied by ORD MAG is the Project Review Board. It has become apparent that the functional timeliness of the ORD Project Review Board is somewhat questionable. Although the function of the PRB is to review projects prior to initiation and to reevaluate their technical and operational merits, this review function occurs when it is almost too late to significantly impact the proposed effort. Perhaps a subject for

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future consideration by ORD MAG and/or management is the reconstitution of the PRB with particular consideration to be given to the separation of the technical and the administrative aspects of this body. Serious thought should be given to obtaining the valuable contributions of senior ORD management during the early stages of projects prior to the initial solicitation stages. The review of overall program goals and technical plans would certainly be more effective and have a more significant impact on ORD resources if it occurred earlier and provided constructive guidance rather than a narrow approval/disapproval verdict. At the same time, the administrative review of proposed efforts, occurring just prior to contract initiation, would be more productive if restricted to contractual aspects, procedures, source justifications, and security.

Another area of concern is the minimum effort expended on the evaluation of many completed research programs. While it is acceptable and expected that divisions handle the initiation and conduct of R&D programs, increased emphasis should be placed on the evaluation of program results at the conclusion of efforts. This is clearly not the case in many projects.

During this review ORD MAG generated a proposed PRB organization for general discussion. While this scheme is not intended for implementation, it provides a basis for discussing the possible merits of such a plan (Attachment 2). Two key elements of this plan are the addition of the technical review panel consisting of ORD technical management and designated technical experts and the requirement for proposed milestones and evaluation criteria to be used during and after the contract effort to evaluate progress and results. These criteria might be constructively used to enhance coordination. ORD MAG recommends the addition of these requirements and the modification of the PRB functions, which could ultimately lead to enhanced participation by ORD customers as well as a better definition of project objectives and technical organization. The objective of such a plan would be to streamline and minimize the annual coordination effort by enhancing the ongoing continuous interaction with customers through the full understanding and participation of management.

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Conclusions:

In summary, it appears that the two major contributors to the current administrative workload are the annual budgeting process and the annual coordination exercise with ORD customers. It is the recommendation of ORD MAG that the distribution of responsibility for these tasks be curtailed and a single ORD staff be given full responsibility for these efforts including the actual preparation of the required documents. The adoption of this recommendation would confine the workload of technical personnel to problems of a technical nature and therefore retain the focus of these individuals on the areas of their greatest expertise.

The second recommendation of the ORD MAG relates to the Project Review Board as it is currently constituted. It is recommended that the function of the PRB be reviewed and that consideration be given to the separation of the technical and contractual tasks performed by this board. This recommendation should bring to bear the greatest possible technical talent to new tasks and assure the understanding and participation of ORD management in all phases of customer liaison and technology transfer.

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Chairman, ORD MAG

Members of ORD MAG:

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